Finance Dashboard

Summary

The OPI collects and reports an abundance of Montana school finance data in order to answer what financial resources are allocated to and utilized by k-12 public school education in Montana. These data include budget funds at the state, district, and county level, as well as per pupil data on expenditures and revenue down to the school level. While detailed finance data can be found using the numerous finance data reports housed in GEMS, the interactive finance dashboard provides visual representation to common elements of the finance reports in an effort to consolidate meaningful data into one dashboard. Utilizing the finance dashboard provides the user with visual insight to the educational finance history and trends in Montana. All finance data is reported as the fiscal year (FY) and most of the finance data is reported down to the district level, except for which is reported down to the school level.
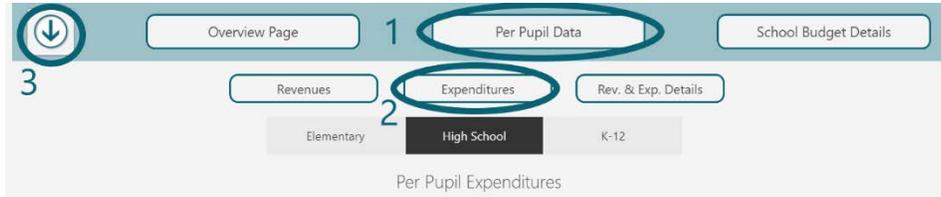
Central Navigation and Knowledge

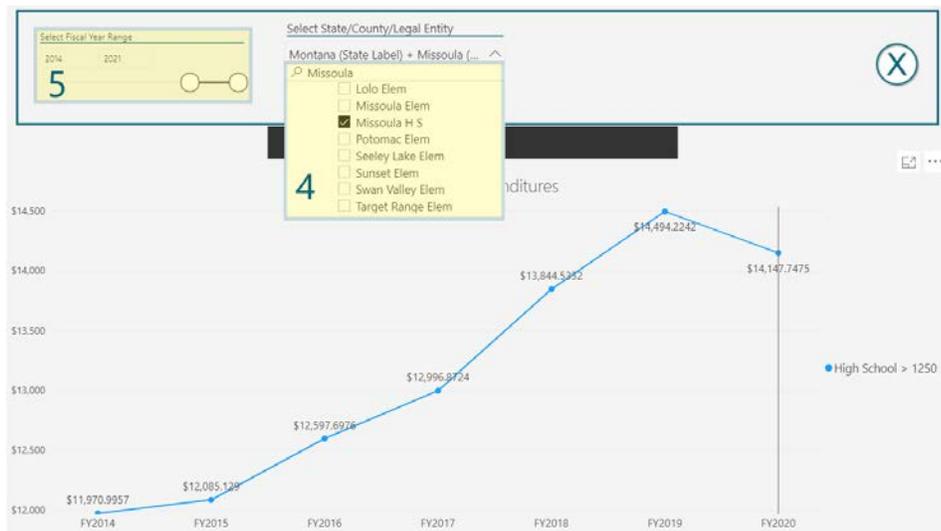|	Page Contents	Page Navigation
Overview Button	-line graph displaying the general fund budget limits over the selected fiscal year range broken out by adopted budget, general fund base, and general fund max -bar graph highlighting the budget limitations for average number of belonging (ANB) broken out by elementary, high school, and K-12 schools over the selected fiscal years	-slicer menu options: filter by year range and state/county/legal entity
Per Pupil Data Button	-Three graphs are housed in this dashboard page which can be toggled through using the internal buttons: revenues, expenditures, and rev. & exp. details. -*revenues graph*: A stacked line graph displays the per pupil revenues by school student count groups (measured using average number of belonging (ANB)) for the selected fiscal years. Using the slicer buttons at the top of the graph, the user can toggle between elementary, high school, and k-12. -*expenditures graph*: The format for the expenditures per pupil graph is the same as for revenue, and the user can still toggle through the three school types of elementary, high school, and k-12. -*details graph*: Three stacked bar graphs which can be navigated by using the slicer buttons at the top of the visualization for per pupil expenditures by function, per pupil expenditures by object, and per pupil revenues by revenue type.	-slicer menu options: filter by year range and state/county/legal entity
School Budget Details Button	-Four bar graphs are housed in this dashboard page which can be navigated by using the bar of buttons at the top of the page for access to the following graphs: funding sources, general fund state funding only, property tax, and fund reserves. Each of these graphs function as a stacked bar chart for each of the fiscal years selected.	-slicer menu options: filter by year range and state/county/legal entity

Where to Start

Below you will find a guided walk-through for accessing specific data to answer a question. This tutorial is provided based on frequently requested data or commonly asked questions on how to view per pupil expenditure and revenue data. This particular walk-through is for per pupil expenditure trends of a chosen district.

Begin by selecting the per pupil data button at the top of the dashboard (1), then select which graph you would like to see: revenue, expenditures, or revenue and expenditure details. For this example, select the expenditures graph (2). If you would like to look at a particular school type you may select that as well: elementary, high school, or k-12

districts. This example looks specifically at one school district, so using the menu slicer (3), select the

county and then district of interest (4). Note the per pupil graphs can also be filtered down to the school level. You may also use the date range slider to select the fiscal years of interest, or manually type the year range into the tool (5).

You will notice there is only one line on the graph now because all Missoula high schools within the district have an ANB count greater than 1,250.

Tips and Tricks

- The finance data is documented as fiscal year (FY) rather than school year (SY).
- The per pupil revenue and expenditures definitions can be found by scrolling down the finance dashboard page and is in button form underneath the dashboard itself.
- The fiscal year budget is proposed at the beginning of the year, while the expenditure and revenue data are reported towards the end of the year. The user may notice the visualizations for the most current year budget is updated while the year's expenditure and revenue visualizations are not.
- Use the search feature in the location filter of the menu slicer to type in the specific town of Missoula to quickly narrow your search.